99th AAPA Annual Convention
North American Container Ports –
A Brief Outlook
September 2010
- Current Demand/Supply Imbalances - USA and Canada

- Pending Changes in Liner Shipping Economics

- Near-term Growth in Key Trade Lanes

- Key Infrastructure Challenges for Container Ports
- **Ports** = Prince Rupert, Vancouver, Seattle, Tacoma, Portland
- **Terminals** = 17
- **Approximate regional capacity** = about 11.5 million TEU/year
- **Estimated regional throughput (2010)** = about 6.3 million TEUs
- **Estimated regional capacity utilization** = about 55%
- **Ports** = Oakland, Los Angeles, Long Beach
- **Terminals** = 20
- **Approximate regional capacity** = about 25.0 million TEU/year

- **Estimated regional throughput (2010)** = about 16.3 million TEUs
- **Estimated regional capacity utilization** = about 65%
- **Ports** = Freeport, Houston, New Orleans
- **Terminals** = 7
- **Approximate regional capacity** = about 3.7 million TEU/year

- **Estimated regional throughput (2010)** = about 2.4 million TEUs
- **Estimated regional capacity utilization** = about 65%
- Ports = Gulfport, Mobile, Tampa
- Terminals = 3
- Approximate regional capacity = about 1.5 million TEU/year

- Estimated regional throughput (2010) = about 0.5 million TEUs
- Estimated regional capacity utilization = about 33%
- Ports = Miami, Port Everglades, W. Palm Beach, Jacksonville, Savannah, Charleston, Wilmington (NC)

- Terminals = 17

- Approximate regional capacity = about 11.6 million TEU/year

- Estimated regional throughput (2010) = about 7.5 million TEUs

- Estimated regional capacity utilization = about 65%
- **Ports** = Hampton Roads, Baltimore, Wilmington (DE), Chester, Philadelphia, NY/NJ, Boston
- **Terminals** = 17
- **Approximate regional capacity** = about 13.5 million TEU/year
- **Estimated regional throughput (2010)** = about 8.5 million TEUs
- **Estimated regional capacity utilization** = about 63%
- **Ports** = Saint John, Halifax, Montreal
- **Terminals** = 6
- **Approximate regional capacity** = about 3.4 million TEU/year

- **Estimated regional throughput (2010)** = about 1.9 million TEUs
- **Estimated regional capacity utilization** = about 56%
NEW LOCKS + FUEL PRICES
Bunker Price Trends since 2000

# Far East – Panama – USEC Slot Costs by Ship Size

Source: Mercator Analysis

<table>
<thead>
<tr>
<th>Vessel Class TEU Size Range</th>
<th>RT Vessel &amp; Fuel Slot Cost Per FEU</th>
<th>Difference from Panamax Class</th>
<th>Percentage Savings</th>
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<tbody>
<tr>
<td>5000 (Panamax)</td>
<td>$2,440</td>
<td>–</td>
<td>–</td>
</tr>
<tr>
<td>6000</td>
<td>$2,115</td>
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<tr>
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<tr>
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<td>$1,750</td>
<td>$690</td>
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USA and Canadian Port Volume
Year to Year Growth Rates
Source: AAPA
Near-Term Growth Outlook: Key Trades by Region

- USA/CAN Pacific Coast
- USA/CAN North Atlantic Coast
- USA South Atlantic Coast
- USA Gulf Coast
- Latin America
- Europe
- Far East

Connections:
- USA/CAN Pacific Coast to USA/CAN North Atlantic Coast
- USA/Gulf Coast to Latin America
- Latin America to USA/CAN North Atlantic Coast
- USA/CAN North Atlantic Coast to USA South Atlantic Coast
- USA South Atlantic Coast to Europe
- USA South Atlantic Coast to Far East
- Far East to USA/CAN Pacific Coast

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